



December 3<sup>rd</sup> 2018

R.J. DeSilva  
Communications Officer  
Legislative Budget Board  
1501 N. Congress, Fifth Floor  
Austin, TX 78701

Re: Agency records retention schedule approved for use.

Dear Mr. DeSilva,

Your agency's records retention schedule is approved for use as of November 30<sup>th</sup>, 2018. Your currently approved records retention schedule is available on our website at <https://www.tsl.texas.gov/slrn/state/schedules.html>. Please ensure that all old copies of the schedule are superseded with this recertified copy.

Your approved retention schedule provides you with continuing authorization to dispose of agency records according to its terms. Please note that state regulations (13 TAC §6.8) require documentation of the final disposition of records by your agency. This requirement may be met by maintaining a disposition log or other evidence of the records series titles, dates covered, volume, and date of disposition. The destruction of any records of your agency not on your schedule requires special authorization from us.

Each agency schedule must be reviewed, updated and submitted for recertification annually for the first two years after the initial approval of the schedule and every five years thereafter. The deadline for submission of your schedule for its next recertification is the last working day of **November 2023**.

During a certification period, changes may need to be made to your schedule. State regulations (13 TAC §6.4) also allow for the submission of amendments to the retention schedule as needed to keep the information in the schedule current. If you are not familiar with the amendment process, or if you have any other questions, please contact the Government Information Analyst assigned to your agency, Andrew Glass at 512-463-2631 or [aglass@tsl.texas.gov](mailto:aglass@tsl.texas.gov).

Your efforts in developing a records retention schedule are appreciated. It not only helps to ensure the integrity of your recordkeeping practices, but it is also essential to the success of your records management program.

Sincerely,

A handwritten signature in black ink, appearing to read "C. Kelso".

Craig Kelso  
Director and State Records Administrator

cc: Agency head

Lorenzo de Zavala  
State Archives and  
Library Building

1201 Brazos Street  
Austin, Texas  
78701

P.O. Box 12927  
Austin, Texas  
78711-2927

[www.tsl.texas.gov](http://www.tsl.texas.gov)

*Commission Chairman*  
Michael C. Waters

*Members*

David C. Garza  
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Larry G. Holt  
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Darryl Tocker  
Martha Wong

*Director and Librarian*  
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*Assistant State Librarian*  
Gloria Meraz

**TSLAC**

*Preserving yesterday  
Informing today  
Inspiring tomorrow*



STATE OF TEXAS

Records Retention Schedule Certification

SLR 105C

Form SLR 105 or SLR 122 must accompany all submissions of this form.

Section 1. Agency Information

(Submitting agencies complete this section only)

Agency Code

104

Agency Name

Legislative Budget Board

(Check one)

- Initial Certification - Form SLR 105
Recertification - Form SLR 105
Amendment - Form SLR 122

I hereby certify that this records retention schedule was prepared in accordance with Texas Government Code, Chapter 441, Subchapter L.

(Check one)

- Agency Head
Records Management Officer

Signature

[Handwritten Signature]

Name (Print or type)

K.J. DeSilva

Date

9/25/18

Section 2. Approvals

(Submitting agencies do not write in this section)

State Auditor's Office

(For the exclusive use of the State Auditor's Office)

Signature

Name (Print or type)

Date

Not Required at This Time

Texas State Library and Archives Commission

(For the exclusive use of the State Library and Archives Commission)

Signature

[Handwritten Signature]

Name (Print or type)

Gloria Meza

Date

11/21/18

Cert/Recert No.

6

Amendment No.

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## CAUTION

**A state record whose retention period has expired may not be destroyed if any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record is initiated; its destruction shall not occur until the completion of the action and the resolution of all issues that arise from it.**

**A state record whose retention period expires during any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record may not be destroyed until the completion of the action and the resolution of all issues that arise from it.**





**STATE OF TEXAS**  
**Records Retention Schedule**

SLR 105  
Rev. 2017-07

Retention Codes (field 7)

AC – See field 9 for specific records series definition  
 AV – Administratively valuable  
 CE – Calendar year end  
 FE – Fiscal year end  
 LA – Life of Asset  
 PM – Permanent  
 US – Until Superseded

Archival Codes (Field 10)

A/I – Transfer to State/University Archivist  
 R/O – Review by State/University Archivist

1. Agency Code: 104			2. Agency Name: Legislative Budget Board								
3. Agency Item No.	4. Record Series Item No.	5. Record Series Title	6. Description	7. Ret. Code	8. Retention Period			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
11023	1.1.023	ORGANIZATIONAL CHARTS		US					A		
11040	1.1.040	SPEECHES, PAPERS AND PRESENTATIONS	Notes or text of speeches, papers, presentations, or reports delivered in conjunctions with agency work.	AC				AC= End of term in office or termination of service in a state position.	R		
11058	1.1.058	MEETING AGENDA AND MINUTES	Official agenda and minutes of state boards, committees, commissions, and councils that conduct open meetings as required by the Texas Government Code.	PM					A	ARCHIVES NOTE: Agency retains permanent record copy. The archival requirement will be met by sending a copy to the Archives and Information Services Division, Texas State Library and Archives Commission.	
11062	1.1.062	MEETINGS-SUPPORTING DOCUMENTATION	Documents submitted at meetings of state boards, committees, commissions, and councils including exhibit items, documentation for agenda items, etc. Includes documents sent in advance of meetings for briefing purposes, some of which may not be submitted at an actual meeting.		2				A		



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11007	1.1.007	CORRESPONDENCE-ADMINISTRATIVE	Incoming/outgoing and internal correspondence pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or projects of an agency and the administrative regulations, policies, and procedures that govern them.		5				R	NOTE 1: Correspondence with members of the legislature and the lieutenant governor is confidential pursuant to the Texas Government Code. NOTE 2: Records relating to requests of Legislative Budget Board staff for the drafting of proposed legislation or for assistance, information, advice, or opinion are not public information. NOTE 3: Agency policy requires information be maintained longer than the Texas State Library and Archives Commission’s minimum. NOTE 4: This record series and Item 1.1.008 should be used only for correspondence that is not included in or directly related to another record series on the agency’s approved schedule. ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review. Contact the State Archives when these records have met their retention periods.	



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11013	1.1.013	CALENDARS, APPOINTMENT and ITINERARY RECORDS	Calendars, appointment books or programs, and scheduling or itinerary records, purchased with state funds or maintained by staff during business hours that document appointments, itineraries and other activities of agency officials or employees.	CE	1				R	NOTE: A record of this type purchased with personal funds, but used by a state official or employee to document his or her work activities may be a state record and subject to this retention period. ARCHIVES NOTE: Only the calendars, appointment, and itinerary records of elected officials, executive staff, board or commission members, division directors, and program heads require archival review. Contact the State Archives when these records have met their retention periods.	
11014	1.1.014	LEGAL OPINIONS AND ADVICE	From agency legal counsel or the Attorney General including any requests eliciting the opinions.	AV					R	NOTE: Does not include legal opinions or advice rendered on a matter in litigation or with regard to pending litigation.	
11024	1.1.024	PLANS AND PLANNING RECORDS	Plans and records relating to the process of planning new or re-defined programs, services, or projects of an agency that are not included in or directly related to other records series in this schedule.	AC	5			AC=Decision made to implement or not to implement as a result of planning process.	R	NOTE: Agency policy requires information be maintained longer than the Texas State Library and Archives Commission's minimum. ARCHIVES NOTE: Data processing planning records are not archival.	



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11048	1.1.048	LITIGATION FILES	Records created by or on behalf of an agency in anticipation of or in the adjudication of a lawsuit.	AC	1			AC=As applicable, decision of an agency not to file a lawsuit or decision that a lawsuit will not be filed against it on a matter; dismissal of a lawsuit for want of prosecution or on motion of the plaintiff; or final decision of a court (or of a court on appeal, if applicable) in a lawsuit.	R	ARCHIVES NOTE: Cases that set legal precedent or exhibit historical value will be evaluated by the Archives and Information Services Division, Texas State Library and Archives Commission, for archival preservation.	
11067	1.1.067	REPORTS AND STUDIES (NON-FISCAL)	Annual, sub-annual, or special reports or studies on non-fiscal aspects of an agency's programs, services, or projects compiled by agency personnel, by advisory committees, or by consultants under contract with an agency that are not noted elsewhere in this schedule. Includes reports distributed either internally or to other entities.		3				R	ARCHIVES NOTE: For agencies that have had an archival appraisal, separate this record series by each type of archival coding (i.e. "A," "R," or "E").	



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11070	1.1.070	AGENCY RULES, POLICIES, AND PROCEDURES-FINAL	Manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency's programs, services, or projects.	AC	3			AC=Completion or termination of program, rules, policies or procedures.	R		
11071	1.1.071	AGENCY RULES, POLICIES, AND PROCEDURES-WORKING FILES	Working files used in the development of manuals, guidelines, administrative rules, or similar records distributed internally for the use of employees or externally to the public or those individuals or entities regulated by an agency that sets out the rules, policies, and procedures that govern an agency's programs, services, or projects.	AC	3			AC=Completion or termination of program, rules, policies or procedures.	R		
13002	1.3.002	PUBLICATION DEVELOPMENT FILES		AV					R		
10000		STATE AGENCY REPORTS RECEIVED- REQUIRED			5						





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10010		STATE AGENCY REPORTS RECEIVED- NOT REQUIRED		AV							
10020		NON-STATE AGENCY REPORTS RECEIVED		AV							
11002	1.1.002	AUDITS	Audits and reviews performed by or on behalf of an agency, including the working papers that support the audit.	AC	7			AC=Publication or release of final audit findings.		NOTE: The State Auditor’s Office retains any copies of its audits performed on state agencies.	
11008	1.1.008	CORRESPONDENCE-GENERAL	Nonadministrative incoming/outgoing and internal correspondence, in any media, pertaining to or arising from the routine operations of the policies, programs, services or projects of the agency.		2					SEE comment to item number 1.1.007. SEE ALSO item number 1.1.010.	
11010	1.1.010	DIRECTIVES	Any document that officially initiates, rescinds, or amends general office procedures.	US	1						
11020	1.1.020	PUBLIC INFORMATION REQUESTS-NOT EXEMPTED	Includes all correspondence and documentation relating to requests for records that are furnished to the public under the Texas Public Information Act.	AC	1			AC=Date request fulfilled.		NOTE: Records relating to requests of the Legislative Budget Board staff for the drafting of proposed legislation or for assistance, information, advice, or opinion are not public information.	



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11021	1.1.021	PUBLIC INFORMATION REQUESTS - EXEMPTED	Includes all correspondence and documentation relating to requests for records that are exempt under exceptions to the Texas Public Information Act.	AC	2			AC=Date of notification that records are exempt.		NOTE: Records relating to requests of the Legislative Budget Board staff for the drafting of proposed legislation or for assistance, information, advice, or opinion are not public information.	
11026	1.1.026	TEXAS REGISTER SUBMISSIONS	Copies of all proposed, withdrawn, emergency, and adopted rules; open meetings notices; or any other documents required by law to be submitted to the Texas Register.	AC	1			AC=Date of publication in the Texas Register.			
11027A	1.1.027	PROPOSED LEGISLATION	Drafts of proposed legislation and related correspondence.	AV							
11027B	1.1.027	PROPOSED LEGISLATION	Drafts and working papers associated with fiscal notes prepared for proposed legislation.	PM						NOTE: Agency policy requires information be maintained longer than the Texas State Library and Archives Commission's minimum.	
11043	1.1.043	TRAINING MATERIALS	Manuals and materials developed by the agency for training entities or individuals it regulates or serves.	US	1					US=Until superseded or no longer useful.	



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11053	1.1.053	REGISTRATION LOGS	Logs or similar records used to register persons appearing before state agencies required by the Texas Government Code including quarterly reports filed with the Texas Ethics Commission.	AC				AC=Report filed with the Texas Ethics Commission.			
11056	1.1.056	AMERICANS WITH DISABILITIES ACT DOCUMENTATION	Self evaluations and plans documenting compliance with the requirements of the Americans with Disabilities Act.		3						28 CFR 35.105(c).



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					Years	Months	Days				
11057	1.1.057	TRANSITORY INFORMATION	Records of temporary usefulness that are not an integral part of a records series of an agency, that are not regularly filed within an agency's recordkeeping system, and that are required only for a limited period of time for the completion of an action by an official or employee of the agency or in the preparation of an ongoing records series. Transitory records are not essential to the fulfillment of statutory obligations or to the documentation of agency functions. Some examples of transitory information, which can be in any medium (voice mail, fax, email, hard copy, etc.) are routine messages; telephone message notifications; internal meeting notices; routing slips; incoming letters or memoranda of transmittal that add nothing of substance to enclosures; and similar routine information used for communication, but not for the documentation, of a specific agency transaction.	AC				AC=Purpose of record has been fulfilled.		NOTE: Caution should be used in assigning this records series item number to records of an agency to make certain they are not part of another records series listed in this schedule or, for records series unique to an agency, are not part of a records series that documents the fulfillment of the statutory obligations of the agency or the documentation of its functions. The disposal of transitory information need not be documented through destruction authorizations (Item 1.2.001) or in records disposition logs (Item 1.2.010), but agencies should establish procedures governing disposal of these records as part of its records management plan (Item 1.2.014).	



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11059	1.1.059	MEETINGS-CERTIFIED AGENDAS OR TAPE RECORDINGS OF CLOSED	Certified agendas or tape recordings of closed meetings of state boards, commissions, committees, and councils.	AC	2			AC=The date of the meeting or completion of pending action involving the meeting, whichever is later.			
11060	1.1.060	MEETINGS-AUDIO OR VIDEOTAPES OF OPEN	Audio or videotapes of open meetings of state boards, commissions, committees, and councils.	AC			90	AC=Official approval of written minutes of the meeting by the governing body of the agency.		NOTE: Minutes of state agencies are permanent records. Audio and videotapes are not permanent media. State agencies may not retain audio or videotapes of the meetings of governing bodies in lieu of written minutes. The proceedings of all meetings of state boards, committees, commissions, and councils must be reduced to writing.	
11063	1.1.063	STAFF MEETING MINUTES AND NOTES	Minutes or notes, and supporting documentation taken at internal agency staff meetings.		1						
11065	1.1.065	REPORTS AND STUDIES (NON-FISCAL) -- RAW DATA	Information or data collected and compiled for the purpose of producing nonfiscal reports.	AV						NOTE: Does not include source documentation used for information or data included in or directly related to another record series in this schedule.	



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					Years	Months	Days				
11069	1.1.069	REPORTS-ACTIVITY	Reports compiled by agency personnel on a daily or other periodic basis pertaining to workload monitoring, task completion times, number of public contacts, and similar activities.		1						
11072	1.1.072	PUBLIC INFORMATION REPORTS	Reports made to the Office of the Attorney General on an agency's Texas Public Information Act activities.		2						
12001	1.2.001	DESTRUCTION AUTHORIZATIONS	Agency-level documents authorizing final disposition of records under a certified records retention schedule.	FE	3						
12005	1.2.005	RECORDS RETENTION SCHEDULE (SLR 105)	Includes documentation of certification and approval and/or other forms designated by the State Records Administrator.	US						NOTE: Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.	
12006	1.2.006	RECORDS TRANSMITTAL FORMS	Forms indicate records transferred to storage or a transfer of legal custody.	AC	2			AC=Date of authorization for destruction, permanent transfer from storage, or transfer to the Archives and Information Services Division, Texas State Library and Archives Commission.			



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					Years	Months	Days				
12008	1.2.008	REQUEST FOR AUTHORITY TO DISPOSE OF STATE RECORDS		FE	3					NOTE: Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission.	
12010	1.2.010	RECORDS DISPOSITION LOGS	Logs or similar records listing records destroyed or transferred to the Archives and Information Services Division, Texas State Library and Archives Commission, showing records series title, dates of records, and dates destroyed or transferred.		10						
12014	1.2.014	RECORDS MANAGEMENT PLANS	Records management plans and similar records that establish the policies and procedures under which records and information are managed in an agency.	US	1						



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13001	1.3.001	STATE PUBLICATIONS	Information in any format that is produced by the authority of, or at the total or partial expense of a state agency, or is required to be distributed under law by the agency and is publicly distributed.	PM						NOTE: Many state publications must be submitted to the Texas State Publications Depository Program, Texas State Library and Archives Commission pursuant to the Texas Government Code. NOTE: Agency policy requires information be maintained longer than the Texas State Library and Archives Commission's minimum.	
21001	2.1.001	PROCESSING FILES	Machine-readable files used in the creation, utilization, and updating of master files.	AC				AC=Completion of third verification cycle, or audit completion confirming successful processing, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur.		NOTE: Caution must be exercised to ensure that when assigning the AC retention period to agency automated processing files that the files do not fall under records series listed elsewhere.	





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21002	2.1.002	MASTER FILES	Relatively long-lived computer files containing organized and consistent sets of complete and accurate electronic records. Examples include, but are not limited to, data tables of relational databases used by applications or computer programs.	AC				AC=Completion of third verification cycle, or audit completion confirming successful processing, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur.		NOTE: Caution must be exercised to ensure that when assigning the AC retention period to agency automated processing files that the files do not fall under records series listed elsewhere.	
21007	2.1.007	SOFTWARE PROGRAMS	Automated software applications and operating system files including job control language, program listing/source code, etc.	AC				AC=Until electronic records are transferred to and made usable in a new hardware environment or there are no electronic records being retained to meet an approved retention period that require the hardware to be retrieved and read.		NOTE: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94



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21008	2.1.008	HARDWARE DOCUMENTATION	Records documenting operational and maintenance requirements of computer hardware such as operating manuals, hardware/operating system requirements, hardware configurations, and equipment control systems.	AC				AC=Until electronic records are transferred to and made usable in a new hardware environment or there are no electronic records being retained to meet an approved retention period that require the hardware to be retrieved and read.		NOTE: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94



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21009	2.1.009	TECHNICAL DOCUMENTATION	Records adequate to specify all technical characteristics necessary for reading or processing of electronic records and their timely, authorized disposition including documentation describing how a system operates and necessary for using the system such as user guides, system or subsystem definitions, system specifications, input and output specifications, and system flow charts; program descriptions and documentation such as program flowcharts, program maintenance logs, change notices, and other records that document modifications to computer programs; and data documentation necessary to access, retrieve, manipulate, and interpret data in an automated system such as a data element dictionary, file layout, code book or table, and other records that explain the meaning, purpose, structure, logical relationships, and origin of the data elements.	AC				AC=Until electronic records are transferred to and made usable in a new hardware or software environment with new documentation or there are no electronic records being maintained to meet an approved retention period that require the documentation to be retrieved and read.		NOTE: Software needed for access to electronic records must be retained for the period of time required to access the records.	13 TAC 6.94



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22001	2.2.001	SYSTEM MONITORING RECORDS	Electronic files or automated logs created to monitor computer systems such as print spool logs, console logs, tape activity logs, etc.	AV							
22012	2.2.012	OUTPUT RECORDS FOR COMPUTER -- PRODUCTION	Reports showing transactions that were accepted, rejected, suspended, and/or processed.	AV							
22013	2.2.013	QUALITY ASSURANCE RECORDS	Information verifying the quality of system, hardware, or software operations including records of errors or failures and the loss of data resulting from such failures, documentation of abnormal termination and of error free processing, checks of changes put into production, transaction histories, and other records needed as an audit trail to evaluate data accuracy.	AC				AC=No longer needed as an audit trail for any records modified			







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31014	3.1.014	EMPLOYMENT SELECTION RECORDS	Includes notes of interviews with candidates, questions asked of applicants, audio and videotapes of job interviews, driving record and previous injury checks, pre-employment physical examinations, pre-employment drug screening test results, polygraph examination results, and all other records that document the selection process.	AC	2					NOTE: Does not include criminal history checks.	29 CFR 1602.31
31018	3.1.018	GRIEVANCE RECORDS	Records relating to the review of employee grievances against personnel policies, working conditions, etc.	AC	2			AC=Final decision on the grievance.		NOTE: Does not include formal complaints filed by an agency employee with the Equal Employment Office of the U. S. Department of Labor.	
31019	3.1.019	PERFORMANCE APPRAISALS		AC	5			AC=Termination of Employment.		NOTE: Agency policy requires information be maintained longer than the Texas State Library and Archives Commission's minimum.	



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31020	3.1.020	PERSONNEL CORRECTIVE ACTION DOCUMENTATION	Corrective actions are those actions which do not affect pay, status, or tenure and are imposed to correct or improve and employee's job performance.	AC	5			AC=Termination of Corrective Action.		NOTE: If during the retention period of this records series, any part of this series is used to document and support personnel disciplinary action under Item 3.1.021, all documentation from this series used to support disciplinary action must be retained for the minimum retention period prescribed for Item 3.1.021.	







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31023	3.1.023	POSITION/JOB DESCRIPTIONS	Job descriptions, including all associated task or skill statements, for positions in an agency.	AC	4			AC=Until superseded or job eliminated.			40 TAC 815.106(i)
31027	3.1.027	TRAINING AND EDUCATIONAL ACHIEVEMENT RECORDS -- (INDIVIDUAL)	Certificates of completion, transcripts, test scores, or similar records documenting the training, testing, or continuing, education achievements of an employee.	AC	5			AC=Termination of employment.			
31029	3.1.029	EMPLOYMENT ELIGIBILITY, DOCUMENTATION OR VERIFICATION	Federal reporting form (INS I-9).	AC	1			AC=Termination of Employment.		NOTE: Federal Regulation requires that INS I-9 forms be retained for three years from date of hire or one year after separation of the employee, whichever later. Agencies should make certain that the I-9 forms for employees who terminate from an agency less than three years from date of hire are kept for the three year retention period.	8 CFR 274a.2(b)(2)(i)(A) and (c)(2).
31031	3.1.031	EMPLOYEE BENEFITS- OTHER THAN INSURANCE	Agency copies of information relating to the selection of available benefit options other than insurance.	AC	2			AC=Until Superseded or Termination of Employment.		NOTE: Documents that serve as payroll deduction authorizations must be maintained for the retention period prescribed for Item 3.2.001.	



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31034	3.1.034	RESUMES-UNSOLICITED	Retention period applies if an agency replies to the sender of the resume that it will be kept on file should future job openings occur.	AV						NOTE: See Item 3.1.014 for resumes, whether solicited or unsolicited, that are in any way used in the employment selection process.	
31038	3.1.038	PUBLIC ACCESS OPTION FORM	Form completed and signed by employee or official, or former employee or official, electing to keep home address, home telephone number, social security number, and family information open or confidential under the Texas Public Information Act.	US						NOTE: See Item 3.3.011.	
32001	3.2.001	EMPLOYEE DEDUCTION AUTHORIZATIONS	Documentation used to start, modify, or stop all voluntary or required deductions from payroll, including garnishment or other court-ordered attachments.	AC	4			AC=After termination of employment or after amendment, expiration, or termination of authorization, which ever sooner.			
32002	3.2.002	EMPLOYEE EARNING RECORDS			4						40 TAC 815.106(i)
32003	3.2.003	FEDERAL TAX RECORDS	Includes 1099, W2, FICA and other tax records.	AC	4			AC=Tax due date, date the claim is filed, or date tax is paid whichever is later.			26 CFR 31.6001-1(e)(2)



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32004	3.2.004	INCOME ADJUSTMENT AUTHORIZATIONS	Used to make increases or decreases to employee's gross pay, FICA, retirement, or in the computation of taxes.		2						26 CFR 516.6(c)
32005	3.2.005	W-4 FORMS	Employer's copy of "Employee's Withholding Exemption Certificate."	AC	4			AC=Superseded, obsolete, or termination of employment.			26 CFR 31.6001-1(e)(2)
32006	3.2.006	WAGE RATE TABLES			2						29 CFR 516.6(a)(2)
32007	3.2.007	UNEMPLOYMENT COMPENSATION RECORDS		AC	5			AC=Until superseded, obsolete, or termination of employment.			
32008	3.2.008	DIRECT DEPOSIT APPLICATION/AUTHORIZATIONS		US							
32009	3.2.009	STATE DEFERRED COMPENSATION RECORDS		AC	5			AC=All accounts with a vendor or vendors for the individual participant have been closed.		NOTE: For instructions regarding the determination of the closure of accounts and for additional information regarding the retention period see the most current edition of the Benefits Coordinator Reference Manual issued by the Employees Retirement System of Texas	



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32010	3.2.010	HUMAN RESOURCE INFORMATION SYSTEM REPORTS	Includes supporting documentation.	AC	4			AC=Termination of employment			
33004	3.3.004	BENEFIT PLANS	Employee benefit plans such as pension; life, health, and disability insurance; deferred compensation; etc., including amendments.	US	1						26 CFR 1627.3(b)(2)
33010	3.3.010	LABOR STATISTICS REPORTS	Reports providing statistical information on labor force.		3						
33011	3.3.011	FORMER EMPLOYEE VERIFICATION RECORDS	Minimum information needed to verify employment, includes name, social security number, exact dates of employment, and last known address and most recent public access option form.	AC	75			AC=Termination of employment.		NOTE: See Item 3.1.038.	
33020	3.3.020	WORK SCHEDULES AND ASSIGNMENTS	Work, duty, shift, crew, or case schedules, rosters, or assignments.		1						
33022	3.3.022	TEXAS WORKFORCE COMMISSION REPORTS	Reports to the agency from the Texas Workforce Commission.		3						



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33023	3.3.023	REIMBURSEABLE ACTIVITIES, REQUESTS AND AUTHORIZATIONS TO ENGAGE IN	Requests and authorizations for travel; participation in educational programs, workshops, or college classes, or other work-related activities for which the expenses of the employee are defrayed or reimbursed.	FE	3						
33024	3.3.024	PERSONNEL POLICIES AND PROCEDURES	Any internally distributed manuals, guidelines, or similar records that define agency wide policies and procedures concerning the personnel of an agency.	US	3						
33026	3.3.026	AGENCY STAFFING REPORTS	Any reports compiled by an agency on aspects of personnel staffing, including listing of all staff by program or name; staff hired during a month; detailed listing of employees within its organizational structure, position vacancies, analyses of turnover rates and seasonality of employment, etc.	US	3						



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33027	3.3.027	APTITUDE AND SKILLS TESTS	Aptitude or skills tests required of job applicants or of current personnel to qualify for promotions or transfers.	US	2					NOTE: One copy of each different test (different in terms of either questions or administrative procedures) should be retained for the period indicated.	26 CFR 1602.31.
33028	3.3.028	APTITUDE AND SKILLS TESTS (TEST PAPERS)	Aptitude and skills test papers of job applicants or of current personnel taking a test to qualify for promotion or transfer.		2						29 CFR 1602.31
33030	3.3.030	TRAINING ADMINISTRATION RECORDS	Instructional materials and other records associated with in-house training of agency personnel on personnel policies and procedures and other policies and procedures that govern an agency's programs, services, or projects.	US	2					NOTE: Does not include hazardous material training records.	
33031	3.3.031	EEO REPORTS AND SUPPORTING DOCUMENTATION	Includes documentation used to complete EEO reports.		3						29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50.



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34001	3.4.001	ACCUMULATED LEAVE ADJUSTMENT REQUESTS	Used to create employee leave balances, to transfer leave balances when an employee transfers positions, to adjust carryover balances on August 31, to correct errors on leave accumulation, and to close out leave accounts on separated employees.	FE	3						
34002	3.4.002	LEAVE STATUS REPORTS	Cumulative report is issued each pay cycle and provides employee leave status for each position.	FE	3						
34004	3.4.004	OVERTIME AUTHORIZATIONS			2						
34006	3.4.006	TIME CARDS AND TIME SHEETS			4						40 TAC 815.106(i)
34007	3.4.007	TIME OFF AND/OR SICK LEAVE REQUESTS		FE	3						
34008	3.4.008	SICK LEAVE POOL DOCUMENTATION	Requests submitted, approvals, number of hours transferred in and out, etc.	FE	3						
41001	4.1.001	ACCOUNTS PAYABLE INFORMATION		FE	3						





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41002	4.1.002	BILLING DETAIL		FE	3					NOTE: Does not include long distance telephone billing detail. See Items 5.5.001, 5.5.006, and 5.5.007.	
41004	4.1.004	ENCUMBRANCE DETAIL		FE	3						
41005	4.1.005	INVENTORY AND OTHER COST FILES	Production, job, labor, quotes, pricing, specifications, etc.	FE	3						
41007	4.1.007	TRANSFERS OR BUDGET REVISIONS	Transfers or adjustment to budgets.	FE	3						
42005	4.2.005	PURCHASE VOUCHERS	Requisitions, orders, receiving reports, invoices, or statements, change orders etc	FE	3						
42006	4.2.006	GENERAL JOURNAL VOUCHERS		FE	3						
42007	4.2.007	EXPENDITURE VOUCHERS	Travel, payroll, etc.	FE	3						
43003	4.3.003	EXPENDITURE JOURNALS OR VOUCHERS		FE	3						
44001	4.4.001	GENERAL AND SUBSIDIARY LEDGERS		FE	3						
44002	4.4.002	ACCOUNTS RECEIVABLE LEDGERS		FE	3						
44003	4.4.003	ACCOUNTS PAYABLE LEDGERS		FE	3						



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45001	4.5.001	WORKSHEETS FOR PREPARING FISCAL REPORTS		FE	3						
45002	4.5.002	INTERNAL FISCAL MANAGEMENT REPORTS	Includes agency monthly budget reports.	FE	3						
45003	4.5.003	ANNUAL FINANCIAL REPORTS	Required by the General Appropriations Act (i.e., 100 Day Report).	AC	6			AC=September 1 of odd-numbered calendar years.	A	NOTE: If an agency does not produce a biennial or annual narrative report as described in Item 1.1.066 then these annual financial reports must be marked with Archival Code A. The archival requirement, when a biennial or annual narrative report is not produced, is met by sending the required copies of the reports to the Texas State Publications Depository Program, Texas State Library and Archives Commission.	
45005	4.5.005	EXTERNAL FISCAL REPORTS	Special purpose reports (e.g., federal financial reports, salary reports, Historically Underutilized Business reports, etc.).	FE	3						
45006	4.5.006	ANNUAL OPERATING BUDGETS		FE	3					NOTE: Required by the General Appropriations Act.	



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45007	4.5.007	USAS REPORTS-DAILY		AC				AC=Receipt and reconciliation of monthly report.			
45008	4.5.008	USAS REPORTS-MONTHLY		AC				AC=Receipt and reconciliation of annual report.			
45009	4.5.009	USAS REPORTS-ANNUAL		FE	3						
46001	4.6.001	MONTHLY BALANCING RECORDS		FE	3						
46002	4.6.002	RECONCILIATIONS		FE	3						
47004	4.7.004	CAPITAL ASSET RECORDS		LA	3						
47006	4.7.006	COMPTROLLER STATEMENTS		FE	3						
47011	4.7.011	TEXAS FACILITIES COMMISSION (TFC) STATEMENTS	Charge or bill statements received by agencies from the TBPC for services provided.	FE	3						
47012	4.7.012	SIGNATURE AUTHORIZATIONS	Signature cards or similar records establishing authority of an agency employee to initiate or authorize financial transactions on behalf of an agency.	AC	3			AC=US+FE			



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51001A	5.1.001	CONTRACTS AND LEASES	<p>Contracts, leases, and agreements include general obligation, land lease, utilities, and construction except for buildings. Documents include specifications, affidavits or publication of call for bids, performance bonds, contracts, purchase orders, inspections reports, and correspondence. May also include other applicable documentation in the master contract file per Texas Comptroller of Public Accounts Contract Management Guide.</p> <p>Executed, renewed, or amended on or after September 1, 2015</p>	AC	7			AC=Expiration or termination of the instrument according to its terms.			



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Retention Codes (field 7)

AC – See field 9 for specific records series definition  
 AV – Administratively valuable  
 CE – Calendar year end  
 FE – Fiscal year end  
 LA – Life of Asset  
 PM – Permanent  
 US – Until Superseded

Archival Codes (Field 10)

A/I – Transfer to State/University Archivist  
 R/O – Review by State/University Archivist

1. Agency Code: <b>104</b>			2. Agency Name: <b>Legislative Budget Board</b>								
3. Agency Item No.	4. Record Series Item No.	5. Record Series Title	6. Description	7. Ret. Code	8. Retention Period			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
51001B	5.1.001	CONTRACTS AND LEASES	<p>Contracts, leases, and agreements include general obligation, land lease, utilities, and construction except for buildings. Documents include specifications, affidavits or publication of call for bids, performance bonds, contracts, purchase orders, inspections reports, and correspondence. May also include other applicable documentation in the master contract file per Texas Comptroller of Public Accounts Contract Management Guide.</p> <p>Executed, renewed, or amended on or before August 31, 2015</p>	AC	4			AC=Expiration or termination of the instrument according to its terms.			
51004	5.1.004	MAIL AND TELECOMMUNICATIONS LISTINGS	Any mailing address, telephone or fax number, or e-mail address records maintained by an agency on its employees or on entities or persons it serves.	US							



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					Years	Months	Days				
51014	5.1.014	OFFICE PROCEDURES	Any internally distributed manual, guidelines, or similar records that establish standard office procedures for an agency; for example, agency style manuals, telephone protocols, mail room procedures, print shop and photocopy ordering instructions.	US	1						
52008	5.2.008	EQUIPMENT HISTORY FILE; EQUIPMENT SERVICE AGREEMENTS	Agreements or contracts between the agency and equipment vendor to provide maintenance service for equipment. Includes requests for installation, moves, service, etc.; and service/repair logbooks, etc.	LA	3						
52010	5.2.010	EQUIPMENT MANUALS		LA							
52011	5.2.011	EQUIPMENT WARRANTIES		AC	1			AC=Expiration of warranty.			
52014	5.2.014	INVENTORY-ANNUAL PHYSICAL	Property, equipment, supply verification.	FE	3						
52015	5.2.015	INVENTORY, NOTICES OF EQUIPMENT REMOVED FROM		FE	3						



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					Years	Months	Days				
53007A	5.3.007	BID DOCUMENTATION	Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, successful and unsuccessful bids, and bid tabulation/evaluations.  Associated with a contract executed, renewed, or amended on or after September 1, 2015.	AC	7			AC=Expiration or termination of the instrument according to its terms or decision not to proceed with the bid.			
53007B	5.3.007	BID DOCUMENTATION	Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, successful and unsuccessful bids, and bid tabulation/evaluations.  Associated with a contract executed, renewed, or amended on or before August 31, 2015.	FE	3						



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					Years	Months	Days				
53007C	5.3.007	BID DOCUMENTATION	Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, successful and unsuccessful bids, and bid tabulation/evaluations.  Unsuccessful bids that do not meet agency submission requirements and are not included in bid evaluation process (e.g. withdrawn, missed submission deadline, incomplete submission, etc.).	AC	2			AC=Date of notification of denial or date of withdrawal, as applicable.			
53008	5.3.008	PURCHASING LOGS	Log, register, etc., providing a record of purchase orders issued, orders received, and similar data on procurement status.	FE	3						
54001	5.4.001	ACCIDENTS REPORTS AND ASSOCIATED DOCUMENTATION	Accident or occupational disease reports (by supervisors and employees) and other associated reports required to be submitted to the Texas Department of Insurance or maintained internally on accident frequency.	CE	5					NOTE: The Texas Department of Insurance retransmits copies of reports sent to it for 50 years.	29 CFR 1904.33.





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1. Agency Code: 104			2. Agency Name: Legislative Budget Board								
3. Agency Item No.	4. Record Series Item No.	5. Record Series Title	6. Description	7. Ret. Code	8. Retention Period			9. AC Definition	10. Archival	11. Remarks	12. Legal Citations
					Years	Months	Days				
54002	5.4.002	EVACUATION PLANS	Plans for evacuation of agency facilities in case of emergency.	US							
54003	5.4.003	INSPECTION RECORDS	Fire, safety, and other inspection records of agency facilities and equipment.	AC	3			AC=Inspection, or date of the correction of the deficiency if the inspection report reveals a deficiency.		NOTE: Does not include inspection reports of building construction.	
54004	5.4.004	FIRE ORDERS	Order issued by the Fire Marshal to correct deficiencies in compliance with the fire code.	AC	3			AC=Deficiency corrected.			
54011	5.4.011	VISITOR CONTROL REGISTERS	Logs, registers, or similar records documenting visitors to limited access or restricted areas of agency facilities.		3						
54012	5.4.012	SECURITY ACCESS RECORDS	Records relating to the issuance of keys, identification cards, building passes, passwords, signed statements or similar instruments of access to agency facilities, equipment or automated systems.	AC	2			AC=Until superseded, date of expiration or date of termination whichever is sooner.			
54013	5.4.013	DISASTER PREPAREDNESS AND RECOVERY PLANS		US							



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					Years	Months	Days				
55001	5.5.001	BILLING DETAIL TELECOMMUNICATIONS (OTHER THAN TEX-AN)	In addition to summary detail any accompanying detailed listing of long distance calls.	FE	3					NOTE: See Item 5.5.006 for TEX-AN billing detail.	
55006	5.5.006	BILLING DETAIL TELECOMMUNICATIONS (TEX-AN)	In addition to summary detail, includes any accompanying detailed listing of long distance calls.	FE	3					NOTE: The billing agency will maintain all long distance TEX-AN records and will provide each using agency its bill summary of centralized capitol complex telephone service without call detail records. For these bill summaries, see Item 4.7.011. See Item 5.5.001 for billing detail from carriers other than TEX-AN.	
55007	5.5.007	DISPUTED CALL DOCUMENTATION	Documentation related to disputed long distance calls, including documents evidencing repayment by employees for personal long distance.	FE	3						
56009	5.6.009	PARKING PERMITS OR ASSIGNMENTS		US							